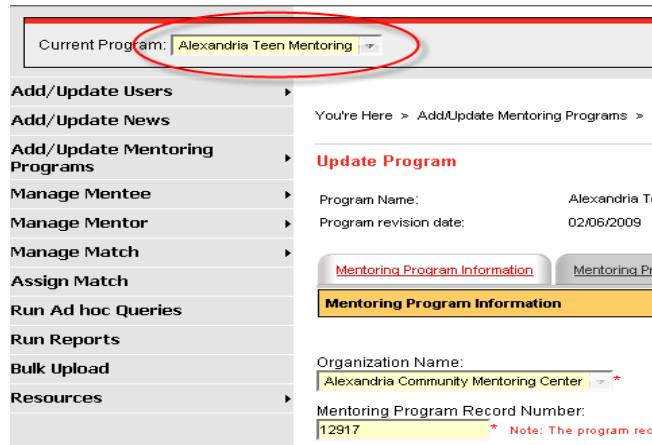


How-to do a Bulk Upload of Mentor/Mentee Information

1. Log-in to MentorPRO using your username and password. Make sure you select the correct mentoring program from the drop-down box!



Current Program: **Alexandria Teen Mentoring**

Add/Update Users

Add/Update News

Add/Update Mentoring Programs

Manage Mentee

Manage Mentor

Manage Match

Assign Match

Run Ad hoc Queries

Run Reports

Bulk Upload

Resources

You're Here > Add/Update Mentoring Programs > .

Update Program

Program Name: Alexandria Te
Program revision date: 02/06/2009

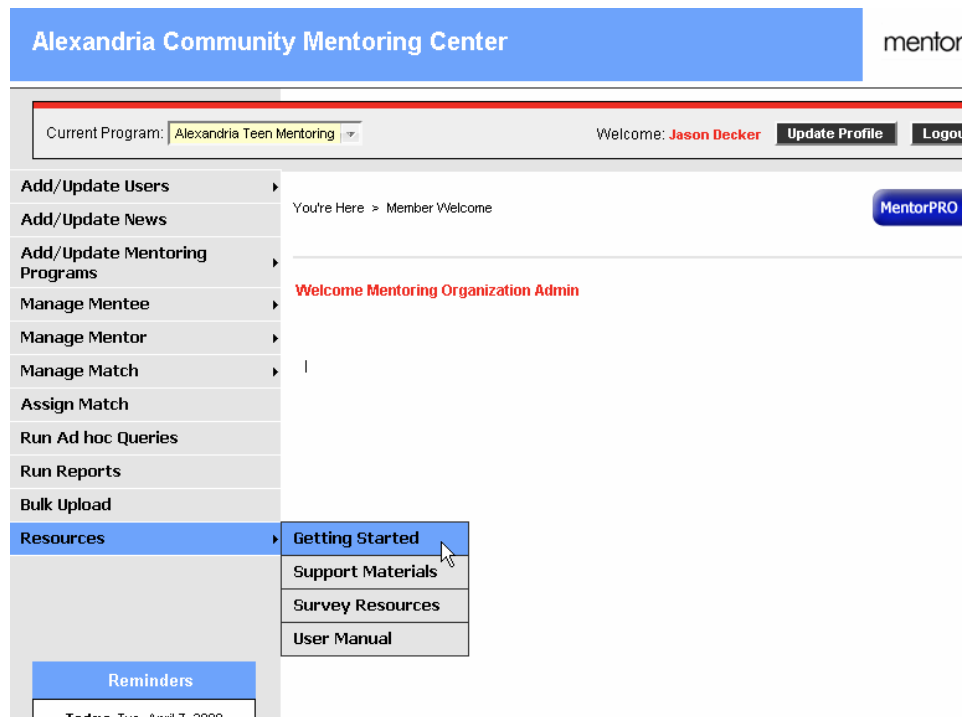
Mentoring Program Information

Organization Name: Alexandria Community Mentoring Center

Mentoring Program Record Number: 12917

Note: The program rec

2. Then, navigate to “Resources → Getting Started” with your mouse and click Update “Getting Started” from the flyout menu.



Alexandria Community Mentoring Center

Current Program: **Alexandria Teen Mentoring**

Welcome: Jason Decker

Update Profile

Logout

You're Here > Member Welcome

Welcome Mentoring Organization Admin

Resources

Getting Started

Support Materials

Survey Resources

User Manual

Reminders

Today: Tue, April 7, 2009

3. Click on the link called “Bulk Upload Template for Mentors.” You will be given the option to “Open” or “Save” the document. Select “Save” and save the document somewhere on your computer (Desktop or My Documents, for example).

Reminders

Today: Tue, April 7, 2009

- ▶ Mentor Referral (0)
- ▶ Mentor Referrals Accepted (0)
- ▶ Mentor Referrals Not Accepted (0)
- ▶ [Match Follow Up \(14\)](#)
- ▶ [Mentors Pending Approval \(47\)](#)
- ▶ Mentors Screening
- ▶ Re-check (0)

Bulk Upload Resources

- [Bulk Upload Instructions for Mentors](#)
- [Bulk Upload Instructions for Mentees](#)
- [Bulk Upload Tip Sheet](#)
- [Bulk Upload Template for Mentors](#)
- [Bulk Upload Template for Mentees](#)

4. Open the spreadsheet you just downloaded from “Resources → Getting Started.”

5. You will see several fictitious entries, which serve as examples that demonstrate how data should be entered into the spreadsheet.

6. Not all fields are required. Here are the lists of fields that must be completed:

A. For Mentors

- First name
- Last name
- E-mail address
- Address
- City
- State
- ZIP Code
- Birthdate
- Gender
- Race
- Application start date

B. For Mentees

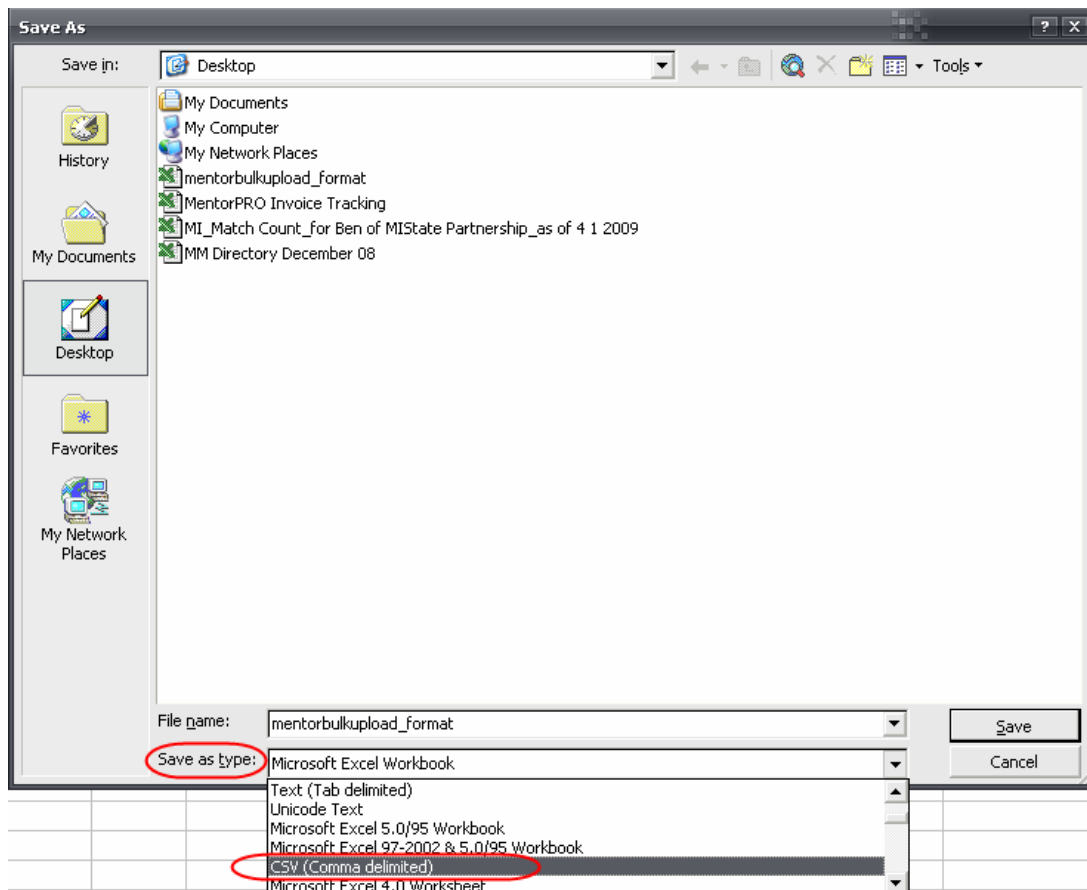
- First name
- Last name
- Address
- City
- State
- ZIP Code
- Primary emergency contact
- Birthdate
- Gender

- Race
- Application start date

7. Pay special attention to:

- A. Phone numbers: They must be entered in 555-555-5555 format, with no parentheses, periods, or commas.
- B. E-mail Address (mentors only): You **must** enter an e-mail address for mentors, even if your program does not collect e-mail addresses. If you do not collect them, then you can create a fictitious e-mail account for them. For example, AlexandriaYouth01@test.com could serve as an e-mail address for “Alexandria Youth Mentoring Program,” and 01 could change to 02, 03, and so on.
- C. State: You must use MI for Michigan.
- D. Date of Birth and Application Start Date: The format must be 01/01/2001.
- E. Race: Be conscientious of spelling. Incorrect spelling will produce an error message when you attempt to upload.

8. Once you have completed the spreadsheet, you are ready to save! Navigate to “File → Save as...” Doing so will open a dialog box with a few options. Do not change the “File name.” Where it says “Save as type:” click the arrow and select “CSV (comma delimited).” Then hit “Save.”



9. Now that you have completed and saved your spreadsheet, you are ready to upload! In MentorPRO, navigate to “Bulk Upload” in the menu on the left side of the page. Make sure to check “Organization” “Program” and “Person Type” for accuracy.

Bulk Upload

Mentee/ Mentor Bulk Upload

Fields marked by * are required

Organization: Alexandria Community Mentoring Center *

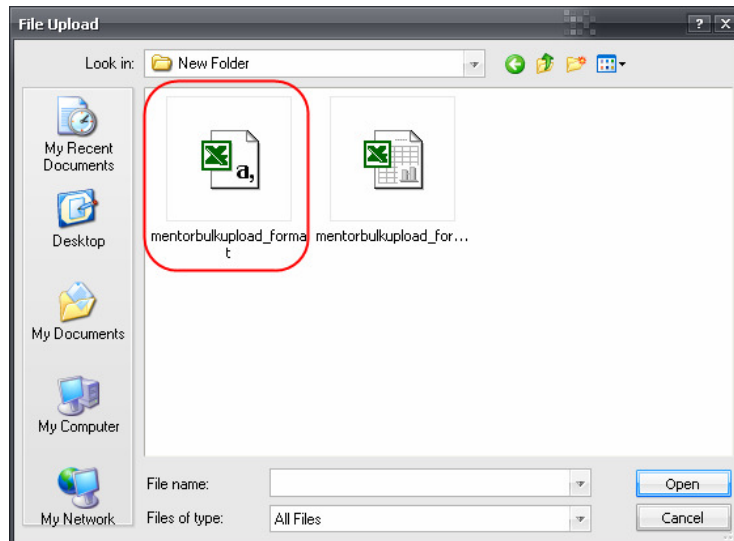
Program: Alfred Middle School *

Person/Type: Mentor *

Bulk Upload: Browse...

Bulk Upload

10. All that's left is to hit “Browse” and locate the spreadsheet we have created. You will see two Excel files with the same name; however, you can tell them apart by their icon. Select the icon circled below – you will notice it has a comma to indicate that it is a CSV file. Select that file, click open, and then select **“Bulk Upload.”**



It's been a bit of a process, but it is finally complete! You have successfully completed a Bulk Upload. If you have any questions, contact Ben Gulker at Mentor Michigan.

Ben Gulker
Phone: 517-241-2716
E-mail: gulkerb@michigan.gov

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